DATA CLOUD FOR MARKETING AND BEYOND

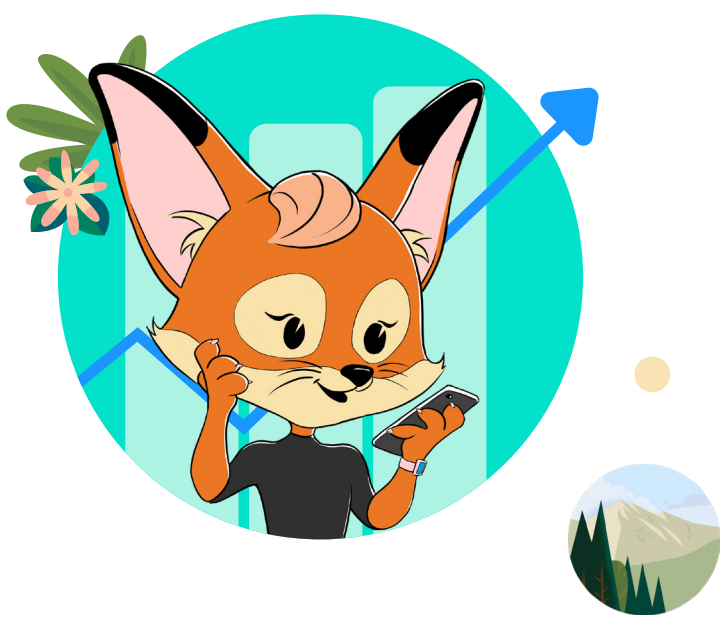
Redefining the CDP

8 Data-Driven Designs for
Successful Customer Journeys

Master the methods of real-time data.

Ad click-throughs. Service cases. Abandoned carts. Making sense of customer behavior can be time-consuming and costly. While understanding customers starts with data, this is easier said than done. Industry changes like the loss of the third-party cookie and rising concerns around consumer privacy have complicated marketers' efforts to know their customer and deliver data-driven experiences.

A customer data platform (CDP) powered by AI solves all this and more. CDPs can connect and activate customer data from a central place – data that is owned, trusted, and collected with consent.



Our own CDP, Data Cloud for Marketing, takes things even further. It puts marketers at the center of the entire customer experience, letting them connect, unify, and activate data across marketing and beyond to enhance the experiences of every team engaging customers – from commerce, to sales, service, and more.

Data Cloud performs four main functions that **redefine the CDP:**

1

It connects.

Connect all your customer data at scale, from any app, device, or real-time stream, with out-of-the-box connectors.

2

It harmonizes.

Unite all your data into a single customer profile – automatically. Data from different channels and teams – like marketing, commerce, sales, service, and more – all integrates seamlessly using match and reconciliation rules.

3

It engages.

Inform all your departments and channels with unified customer profiles, which update in real time through AI-powered intelligence and analytics.

4

It delivers an experience.

Data activated from Data Cloud for Marketing powers real-time, personalized experiences for your customers in critical, timely moments.

In this guide, discover eight use cases of how Data Cloud for Marketing applies these functions to tackle common challenges faced by marketing teams, together with their peers in commerce, service, and sales teams. From boosting engagement to earning customer loyalty, these aptly titled, data-driven designs will show you how a CDP can make every moment count.

Contents

Introduction.....2

Design 01: The Engagement Booster.....4

Design 02: The Efficient Advertiser.....5

Design 03: The Shopper Styler.....6

Design 04: The Website Winner.....7

Design 05: The Cross-Seller.....8

Design 06: The Insight Viewer.....9

Design 07: The Service Solver.....10

Design 08: The Loyalty Earner.....11

Conclusion.....12

CDP, Brandy,and the Customer Experience

CDPs help marketers connect with customers in a whole new way. To show how, each chapter contains an illustrated diagram demonstrating their powerful impact on the end customer experience. To help show this clearly, we've enlisted the help of our very own Brandy the Marketer as a stand-in for the end consumer.

Let's begin.

The Engagement Booster

Meet your customer in the perfect moment with real-time data.

Marketers: B2B | B2C | Digital

Benefits: Improved Engagement | Higher Efficiency

KPIs: Email Click-Through Rates | Conversions | Higher Sales Revenue

Data Involved: Engagement Data | Web and Streaming Data | Purchase Orders | Store Visits | Page Browsing | Web Clicks

1 CONNECT

CDP connects Brandy's customer data from all data sources, within and outside Salesforce.

2 HARMONIZE

Brandy's unified profile is formed in CDP. It contains all her engagement activity from across channels and departments – from email opens to page clicks, ecommerce wish lists, and more. CDP automatically updates in real time with the latest signals, like data from geosensors or web interactions. If a customer opts in, CDP can use that information to automatically send a personalized text offer a few days later.

3 ENGAGE

New geolocation data from Brandy's phone triggers an engagement action. Upon entering the physical store, a personalized offer is sent to Brandy's phone as she walks down the aisle.

4 EXPERIENCE

Brandy is out shopping for a new house plant that she's had an eye on for a while. To her excitement, she gets a discount on the exact one she wanted to buy – right there in the aisle!

KEY TAKEAWAY

Deliver the most value to your customers at the moment they need it.

CDPs trigger automatic engagement actions based on real-time data. Data triggers include things like fraud alerts, health reminders, in-store discounts, and more

The Efficient Advertiser

Make every ad dollar count.

Applicable Marketers: B2B | B2C | Digital Advertisers | Ad Data Specialists

Main Effects: Higher Efficiency

KPIs: Return on Ad Spend (ROAS)

Data Involved: Loyalty Status | Past Purchases | Service Cases | Email Engagement | Internet of Things (IoT) Data | Web Browsing

CONNECT

CDP connects Brandy's customer data within and outside Salesforce – like loyalty, purchase and ecommerce, service case, and marketing engagement data. It also connects with AppExchange providers like Epsilon, enriching customer profiles with more information like demographics and affinity data

HARMONIZE

CDP pulls together Brandy's unified profile, and then creates high-value segments and AI-powered lookalike audiences. Segment-level insight data from ad partners like Google are added to refine and discover new segments – like customers in need of specific products and upgrades.

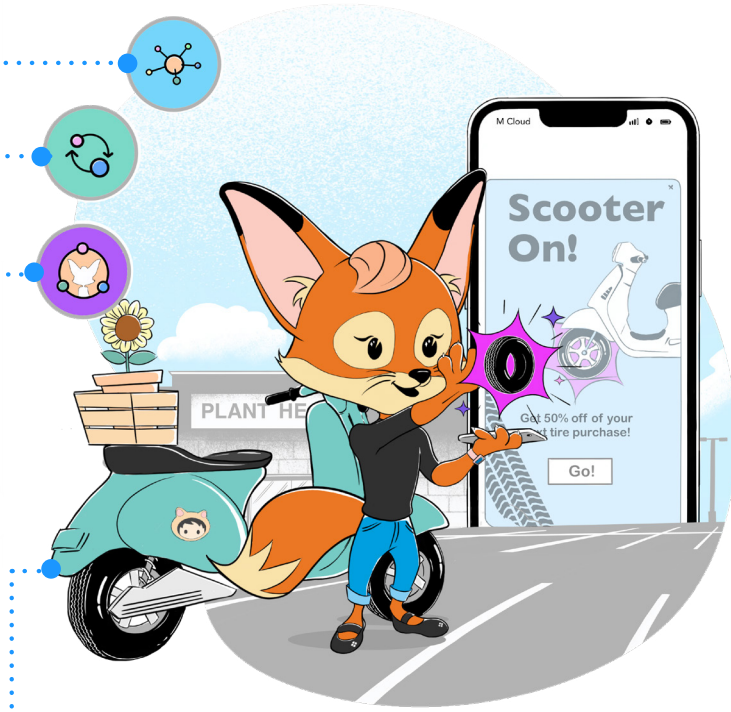
ENGAGE

CDP activates these high-value segments to strategic ad partners like Google, Facebook, and Amazon to send hyper-personalized ads to Brandy. It also links to ad ecosystems on AppExchange, like Trade Desk, to reach new channels – all while protecting Brandy's consumer privacy. Simultaneously, CDP suppresses ads to irrelevant audiences, customers with open service cases, people who already bought the item, and those unlikely to engage.

EXPERIENCE

Brandy's tire light has turned on, signaling the need for a replacement. She later encounters a personalized ad for the exact new tire she's looking for – down to the make, model, color – heck, even the price she's looking for!

1
2
3
4



KEY TAKEAWAY

Make the most of every ad dollar.

CDP activates first-party data in real time to direct ad spend to its best possible use. This ensures maximum relevance and accuracy to your audiences.

The Shopper Styler

Drive revenue with personalized ecommerce.

Applicable Marketers: B2B | B2C | Marketers | Ecommerce Specialists

Main Effects: Increased Conversions

KPIs: Ecommerce Revenue

Data Involved: Past Purchases | Browsing History | Behavioral Activity | Engagement Preferences | Ecommerce Activity | Loyalty Status | Service Cases | Email Engagement

1

CONNECT

CDP pulls data across all of Brandy's touchpoints with the brand. This includes past purchases, shopping preferences, loyalty information, sales data, service interactions, website engagement, and more.

2

HARMONIZE

Using first-party data from Brandy's unified profile, CDP derives Calculated Insights – net new metrics like propensity scores to understand a customer's likelihood to buy certain products. These insights, derived from data like loyalty status or shopping activity, help marketing and ecommerce teams make decisions faster. Also, CDP can power personalized shopping experiences promoting those products.

3

ENGAGE

CDP activates data to Commerce Cloud to deliver a personalized experience from Brandy's favorite retailer upon login. Rewards points, nearby stores, recent purchases, and recommended products populate automatically – all thanks to her propensity score.

Real-time data in CDP can automatically trigger actions in Brandy's customer journey. Actions like clicks, abandoned carts, or product restocks can kickstart a journey or send personalized emails that anticipate Brandy's needs and inspire action.

4

EXPERIENCE

Visiting her favorite camera brand's website, Brandy gets personalized recommendations on products she needs. However, she doesn't have time to finish checkout and abandons her cart. Recognizing her as a loyal customer, CDP automatically triggers a reminder email with a discount to incentivize completing her order.

KEY TAKEAWAY

Connected data drives commerce revenue.

Ready to upgrade to a new camera, Brandy visits her favorite retailer's website. Recognizing her as a loyal customer and analyzing her past purchase data, CDP automatically triggers a personalized trade-in offer, giving her an in-store credit in exchange for her old camera.

The Website Winner

Increase conversions with personalized web experiences.

Applicable Marketers: B2B | B2C | Digital Marketers

Main Effects: Increased Web Engagement, Conversions

KPIs: Bounce Rate | Pages Per Session | Average Session Duration | Time on Page

Data Involved: Past Purchases | Engagement Data | Loyalty Status | Web Browsing Data

CONNECT

CDP draws together customer data across marketing, commerce, sales, and service interactions.

HARMONIZE

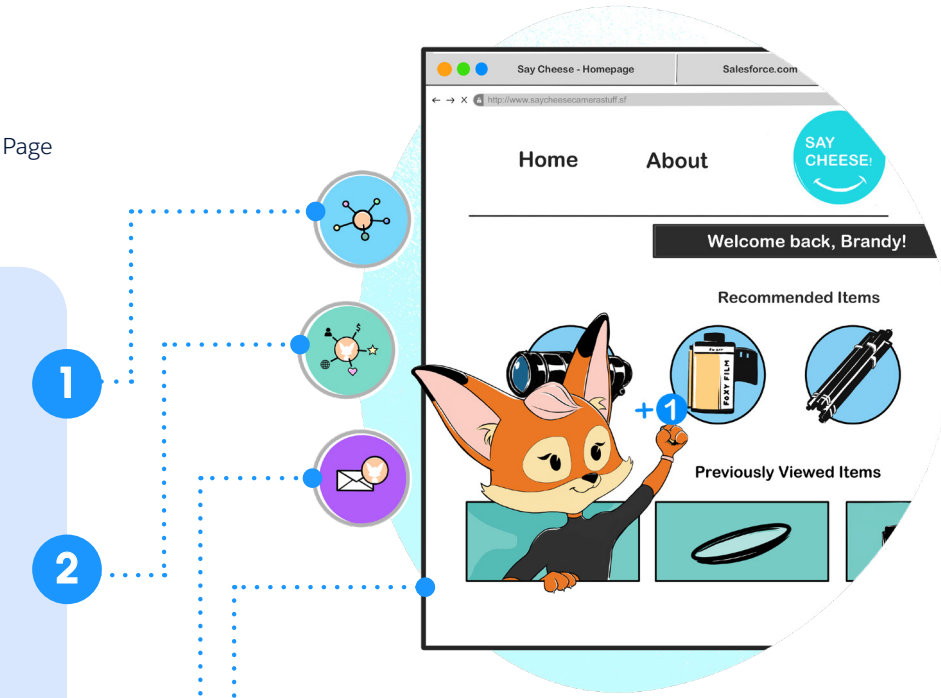
After unifying all of Brandy's data into a single customer profile, CDP identifies past purchase behavior, including her recent purchase of a camera. CDP then places her in a post-purchase segment focused on helping her start getting immediate value from her new gadget.

ENGAGE

Based on Brandy's recent purchase data, CDP triggers a personalized email, prompting her to learn more on the brand's website about the setup and use of her camera. With the CDP connector to Marketing Cloud Personalization, the website dynamically populates with how-to articles, setup instructions, and other personalized content upon Brandy's arrival.

EXPERIENCE

When Brandy follows the email to the website, she finds a webpage populated with content relevant to her recent activity – like camera-related articles and videos, relevant imagery, and additional product offers.



KEY TAKEAWAY

Customized web experiences convert customers.

CDP connects recent purchase, service, and marketing data to Marketing Cloud Personalization – activating that data across website content. This lets marketers dynamically personalize each customer's web experience in real time – driving engagement and propensity to purchase.

The Cross-Seller

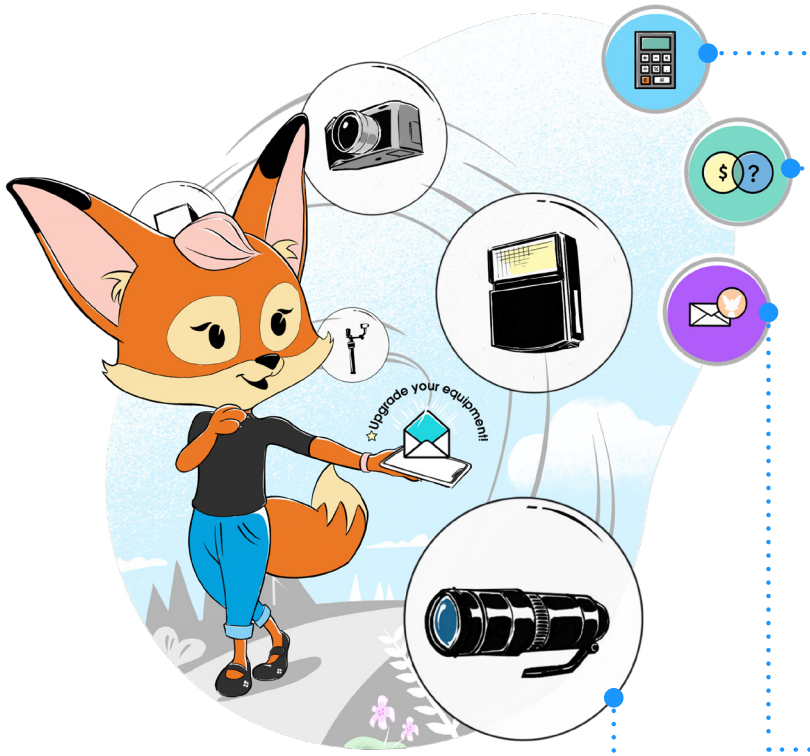
Know what your customer wants to buy next.

Marketers: B2B | B2C | Ecommerce Specialists | Digital Marketers

Main Effects: Increased upsell and cross-sell opportunities and revenue

KPIs: Sales Revenue | Product Views | Increased Basket Size | Increased Customer Purchases

Data Involved: Past Purchases | Behavioral Data | Loyalty Status | Engagement Data



1 CONNECT

Data connects across marketing, commerce, loyalty, sales, and service interactions to create unified customer profiles. CDP's Calculated Insights identifies up-sell and cross-sell opportunities based on this data. It can also calculate customer lifetime value, propensity-to-churn scores, customer engagement scores, and more.

2 HARMONIZE

Calculated Insights creates a new metric around Brandy's affinity to buy other products based on her calculated affinity score data. Additionally, it then uses this data in segmentation to create new audiences around that insight.

3 ENGAGE

CDP activates this data across engagement platforms like Marketing Cloud Engagement and Personalization. Brandy and customers in her segment experience personalized emails, web experiences, and ads across their preferred channels – all for products they're considering.

4 EXPERIENCE

As Brandy browses the website, personalized shopping recommendations automatically populate the page. Some lenses, a camera tripod, and a carrying case populate in the middle of the page, with the header "Brandy's Picks." Wanting to complete her camera setup with additional gear, Brandy adds these items to her cart and places her order.

KEY TAKEAWAY

Stay ahead of your customer's wish list – and your revenue goals

CDP's Calculated Insights feature helps you drive upsell and cross-sell ecommerce revenue by recommending products your customers are most likely to buy.

The Insight Viewer

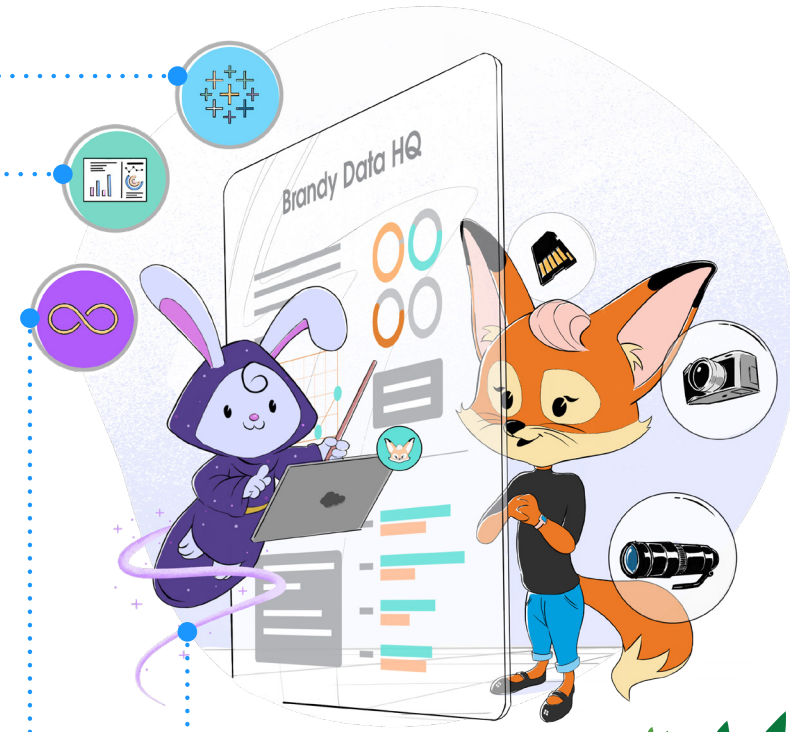
Capture marketing performance through a new lens.

Applicable Marketers: B2B | B2C | Marketing Analysts

Main Effects: Optimized Performance | Deeper Insights | Return on Investment Time

KPIs: Product Views | Sales Revenue | ROI | Engagement Metrics

Data Involved: Past Purchases| Cross-Channel Activity and Insights | Engagement Performance | Sales Interactions | Campaign Performance



CONNECT

CDP connects offline and online touchpoints across marketing, sales, service, commerce, and loyalty, creating unified customer profiles. This data goes to intelligence tools like Tableau and Marketing Cloud Intelligence for further audience discovery and measurement.

HARMONIZE

Marketing Cloud Intelligence pulls spend and performance data together to help marketers optimize campaign and journey performance. Tableau lets customer insights teams discover new high-value segments and behaviors that lead to high adoption and lifetime value.

ENGAGE

CDP begins a continuous cycle of optimization. It sends raw performance data to Marketing Cloud Intelligence to fine-tune campaigns and creative. Tableau surfaces audience and behavioral insights, identifying areas of high engagement and adoption. Finally, these insights flow back to CDP to power even more personalized moments.

EXPERIENCE

As Brandy enjoys her purchases, the retailer stays in touch with personalized, timely offers, and content across her preferred channels. With data being collected and analyzed in real time, the retailer can measure and maximize campaign performance, learn about new segments, and focus on high-value customer actions.

KEY TAKEAWAY

Better insight and analysis lead to better performance and personalization.

CDP's connection to intelligence tools like Marketing Cloud Intelligence and Tableau help continuously optimize your marketing – creating ever greater personalized moments of connection with your customers.

The Service Solver

Turn service cases into satisfied customers.

Marketers: B2B | B2C | Marketing Analysts | Service Agents

Benefits: Customer Satisfaction

KPIs: # of Service Cases Created | Length of Open Service Case | Customer Satisfaction Score

Data Involved: Past Purchases | Sales and Service Data | Loyalty Status | Marketing Engagement | Web Browsing Activity

1

CONNECT

CDP pulls in service data – including open cases, service interactions, survey feedback, customer lifetime value, loyalty data, and more.

2

HARMONIZE

Service data in CDP enriches the audience segmentation process. This helps marketing tailor their engagement based on a customer's interactions with the service department. In Brandy's case, she found a typo in her shipping address in the order confirmation and logs a service case to correct the issue.

3

ENGAGE

CDP gets notified of Brandy's service case, and pauses all marketing efforts while it remains open. Additionally, thanks to being fed data from CDP, the service team has access to Brandy's unified profile and is aware of Brandy's problem as soon as she contacts a service rep – quickly resolving the issue.

4

EXPERIENCE

Brandy gets her order issue resolved in a matter of minutes. When the case opens, the service team reaches out already knowing her order and her customer profile. Not only does she get her order resolved quickly, but she automatically receives a personalized email containing a 20% off discount code for her next order as an apology for the mistake.

KEY TAKEAWAY

Connected service and marketing lead to faster service and satisfied customers.

When CDP powers service and marketing, your customers actually enjoy interacting with you. No more customer confusion. No more unwanted marketing when customers have open service cases. When service teams have access to CDP's real-time, unified data, they become aware of customers' issues before a case is logged and can resolve it faster.

The Loyalty Earner

Reward customer love at every level.

Applicable Marketers: B2B | B2C | Loyalty Specialists

Main Effects: More Loyal Customers | Building Brand Advocates

KPIs: # of Loyalty Program Customers | # of Customers in Each Loyalty Tier

Data Involved: Past Purchases | Loyalty Reward Points | Engagement Behavior | Spend Data | Brand Interactions

CONNECT

CDP connects loyalty data from the camera company's loyalty management system into Brandy's unified customer profile, along with marketing, sales, service, and commerce data.

HARMONIZE

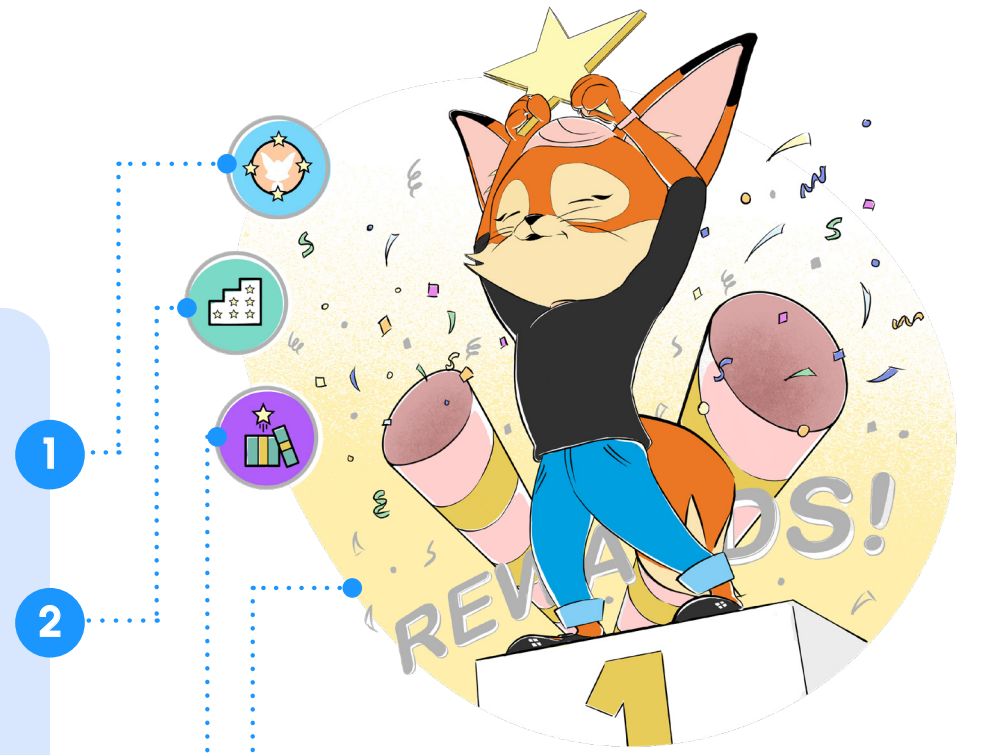
Based on various brand interactions from Brandy and other customers in her audience segment, CDP automatically places them into a loyalty tier with a high potential to move up to the next tier.

ENGAGE

CDP activates this segment across engagement platforms like Marketing Cloud. Brandy and other customers occupying this segment receive personalized content. The content is tied to their loyalty status and encourages them to reach the next loyalty tier through exclusive rewards, timely discounts, early preorders, and more.

EXPERIENCE

Brandy's latest purchase of camera accessories qualifies her for the next tier of rewards membership. This earns her exclusive discounts and ways to earn more points.. She celebrates the moment in style.



KEY TAKEAWAY

Reward customer love with personalized loyalty.

By connecting loyalty data to the rest of your marketing data in CDP, you deliver richer, more personalized loyalty experiences at every step in the customer journey – keeping your best customers coming back for more.

*"State of Marketing," Salesforce, November 2022

CONCLUSION

It's time to build your customer data platform strategy.

We can help.

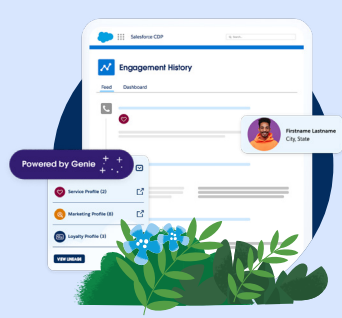
With a CDP in hand, marketers can connect every moment with a single source of actionable, real-time data. They can truly know their customers and deliver personalized engagement that drives revenue and builds relationships.

However, the customer journey extends beyond marketing. Every department and team should benefit from the power of a CDP. Powered by Salesforce Customer 360, Data Cloud for Marketing unifies your customer data across all channels and departments into a unified customer profile.

With a single view of your customer across all touchpoints with your brand, Data Cloud for Marketing gives marketing – and all your teams – the power to make every moment feel connected and contextually relevant. Together, your company can finally speak to your customers not as siloed departments, but as one brand and one voice. A voice that understands, engages, and speaks with relevance and trust.

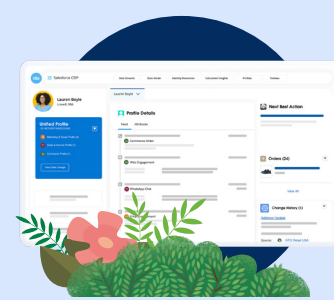
From more personalized product recommendations to more targeted and efficient advertising, Data Cloud for Marketing can help you make every moment count and unlock the value of real-time customer data.

Ready to learn more? Here are some resources to help you build out your strategy moving forward:



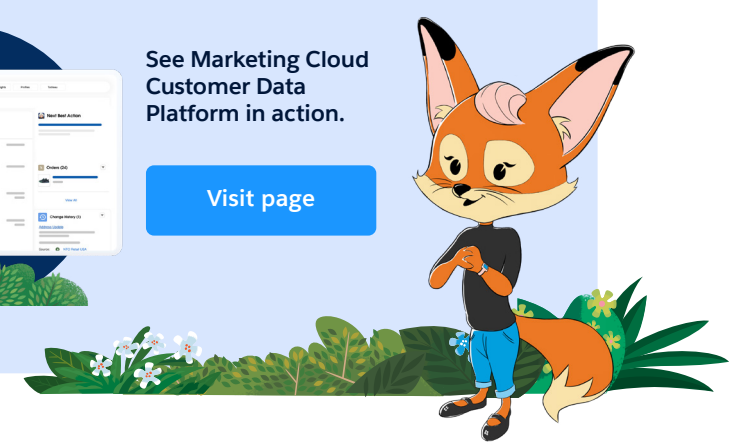
Learn more about Marketing Cloud Customer Data Platform.

Visit page



See Marketing Cloud Customer Data Platform in action.

Visit page



salesforce